



Working With Your Production Vendor

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Everyone involved in the journal production process is busy. We are all constantly striving for more streamlined workflows while maintaining the highest quality. Yet often, time is wasted on redundant tasks, or because of confusion regarding who's responsible for what, or most commonly, because there's insufficient understanding of the most efficient practices for a given situation. Imagine how the production process might be improved if you really collaborated with your production vendor.

To answer the question "How can I work better with my production vendor?" I polled ~80 Production Editors at Dartmouth Journal Services and asked them to complete the following:

- The workflow is best when my Managing Editor...
- It's frustrating when my Managing Editor...

The responses were thorough and consistent, and fell into five main categories.

1. *Incomplete or Substandard Submissions Create Delays*

The production vendor will not properly and efficiently be able to process files that have pieces missing. Performing the initial stages of production on an incomplete submission, just to then place the article on hold, has little benefit and will likely result in more of a delay and extra handling. Tracking which articles have gaps and matching up subsequent, piecemeal elements, which are typically provided outside the standard submission system, are time-consuming and prone to error. Waiting an extra few days to ensure you have a complete package of source material, including full and accurate metadata, is well worth the time up front prior to handing off to production.

2. *Production Is Staged and Scheduled*

Production processes include multiple article and issue stages, most of which are linear but with many dependencies. The production schedule establishes all of these stages in a granular manner, with defined intervals that allow adequate time for every stage. (If you are not certain what is done at a particular stage, ask your production contact for clarification.) When the production vendor receives materials very late or even past the due date, and then needs to accelerate a stage, errors might result. Special requests and deviations to the schedule usually have a ripple effect that impacts other production stages and critical dates. It's also more difficult to make up for delays when they occur at a late stage of production. Try to provide time-sensitive materials and updates on or before they are due. Delays and tweaks to the schedule are a fact of life in production. When necessary, give as much notice as possible so that they can be planned for and adjustments can be made so as not to be detrimental to the most critical goals.

3. *New Initiatives, Special Requests, and Workflow Changes Take Time*

- Every project or new initiative takes time to communicate and clarify the request and intent;
- develop a project scope and schedule;
- build and test solutions;
- revise the workflow, tool, or system;
- write system, maintenance, and/or user documentation;
- (re)train staff; and
- implement.

Projects such as composition redesigns, establishing new article types, editorial style changes, third-party or platform changes, and launching

new products or workflows can require significant work for your production partner. When planning for a new initiative or workflow change, incorporate plenty of time into the process so that it can launch successfully. Also, involve your production vendor in the planning; although it's a first for you, your vendor has likely done it before and can provide good advice about the best ways to succeed (and the pitfalls to avoid).

Additionally, requests that might seem simple to you (*i.e.*, status updates, resolving queries with an author, retrieving a legacy article) can take considerable time to fulfill. When they are random, out-of-the-norm requests, your Production Editor will be pulled away from important production duties to research, perform the action, and respond.

4. *Unclear Expectations and Unanswered Questions Cause Confusion and Rework*

If your Production Editor asks you a question, s/he likely has exhausted all other avenues for an answer. S/he would not ask if it wasn't truly necessary to have a clear and direct answer from you. Delays in answering will result in production delays or in actions that might not be proper. If you have a request, be clear with your expectations and required time frame so that your Production Editor can reprioritize tasks and take care of the most important and urgent things first. A clear and comprehensive initial correspondence will save everyone from confusion and excessive email time downstream. Finally, if you have a question regarding a process or tool, or the best way to handle something that impacts production, *ask!* Foreign ground for you may be a well-trodden arena for your production vendor.

5. *Communicate, Communicate, Communicate!*

At the core of all good relationships is good communication. Keeping your Production Editor informed about anything unique, with sufficient details and background information, allows her/him to properly prepare to meet your needs and

successfully address the situation. For instance, consider the following:

- New article type
- New page element
- Journal redesign
- Editorial style change
- High-profile editorial or lead article (usually submitted late!)
- New Editor-in-Chief
- High-maintenance author
- Special issue
- New initiative or workflow change
- Must-meet conference or special meeting
- Vacations and holidays
- Staffing change
- Late, but must-include article
- Known schedule delay
- Change with online display
- Change with other vendors (peer-review provider, online host, etc.)
- New product (spin-off journal, mobile app, etc.)
- Special collections

Are you in the midst of any of these right now? Are any (perhaps, *many!*) of these being considered within your Editorial Office? Your advance notice of an upcoming situation is not only welcome and appreciated, it's critical. From a one-off isolated event, to something that requires special handling, to a significant and permanent change, your production vendor can help with your planning, can provide insight based on known successes (and failures), and most certainly will be a key to your success.

As well, your candid feedback regarding any kind of error or challenging situation is necessary for problems to be analyzed and improvements realized. Your production vendor should welcome your feedback, striving to perfect what's not working well and mimic what is working well.

Thinking of your production vendor as a partner, as an extension of your Editorial Office, will make for a smoother, less stressful journal production environment for you.